Healthfirst Automates Medicare Enrollment Paperwork with Capturx

Healthfirst is one of the fastest growing health plans in New York and New Jersey, providing high-quality healthcare coverage through a variety of health insurance programs, including Medicare Advantage. Every day, Healthfirst representatives meet with Medicare beneficiaries to discuss their health plan needs and Medicare Advantage health plan options. When beneficiaries choose to enroll in a Medicare Advantage plan, they can conveniently complete the enrollment application with Healthfirst representatives in hospitals, senior citizen homes, or enrollment seminars using normal paper forms and digital pens. Capturx software instantly digitizes and processes the enrollment data from the digital pens, enabling Healthfirst to provide speedier service and more easily meet state submission deadlines.

Challenge:

Healthfirst representatives work onsite with Medicare beneficiaries to explain the range of Medicare Advantage plan options. If an eligible beneficiary opts to enroll in a plan, then they complete a multi-part paper enrollment form onsite with the Healthfirst representative. One copy of the completed form is left with the applicant and the representative takes the other copies for processing.

Healthfirst has a goal of processing each application within seven days. The timing can be tight as the paper applications need to be: driven or sent by courier from the field to central office, reviewed by managers, resubmitted in cases where data was missing, and finally sent to the Enrollment Department, where they are manually keyed into enrollment systems.

Healthfirst considered using mobile computers to speed-up form processing, but they needed forms that identically matched the form approved by regulators and a solution that was comfortable and convenient for working with beneficiaries in remote locations.

Solution: Capturx for SharePoint & Digital Pens

To speed up the processing without disrupting the field workflow, Healthfirst selected the Capturx for SharePoint forms solution deployed with digital pens. With Capturx, Medicare beneficiaries and enrollment teams continue easily completing the standard set of paper forms using digital pens and ordinary ink. As the data is written, it is also instantly scanned and stored on the pen, which can hold data for hundreds of forms. Teams can immediately send the data to the back office via the pen's built-in Bluetooth capabilities with cell phones or by simply connecting pens to PCs via USB.

Summary

Customer: Healthfirst provides healthcare coverage through a variety of insurance programs, like Medicare Advantage. In this case they discuss options with beneficiaries and facilitate Medicare Advantage Enrollment.

Challenge: Enrollment application processing needed to be streamlined for 7-day submission deadlines, better customer service, and administrative flow.

Solution: Capturx for SharePoint and digital pens instantly captures and send digital application data to the server.

Results: Getting immediate access to data from the field enables the processing team to start instantly, meeting state submission deadlines more easily and providing better customer service with less administrative work.

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RICHARD RAPHAEL
Sr. Business Analyst,
Information Systems, Healthfirst

With Capturx, the back office gets immediate access via their SharePoint Server to both scanned copies of the original handwritten data with signatures as PDF image files and structured data tables using advanced character recognition. The server automatically verifies required fields, and sends a confirmation message or alert that more fields need to be filled out and sent. After the application is verified as complete, the enrollment team begins processing the application and the representative leaves the enrollee with a copy of the completed form. The structured data is available for immediate processing with instant alerts, notifications for review, and for integration into Healthfirst's back-end systems.

"As we reviewed our workflow, it became clear that we had many unique steps and processes to automate in order for us to achieve our goals," said Richard Raphael, Sr. Business Analyst, Information Systems, Healthfirst. *"The Capturx software and team were able to accommodate all of those specific requirements, making the deployment a success, and achieving a high ROI."*

Results: Enrollment teams immediately process applications

Faster Enrollment Processing and More Easily Meet Submission Deadlines
With Capturx, Healthfirst was able to successfully reduce application submission and processing time. There were no more delays from completed paper forms having to be driven or sent by courier to the back office for manual data entry. Data was instantly available to the back office processing team – making it even easier to comply with state submission deadlines.

"Huge Savings in Man Hours"
Eliminating the need to physically handle the paperwork also reduces the cost of paper handling. Those costs include transportation – driving and couriering paperwork – and the costs of people scanning the paper. Managers can better use that time saved to work with applicants and representatives. The representatives can stay in the field longer to meet with more beneficiaries.

"After our deployment, the digital pen was mentioned at our annual meeting, where it received a huge ovation," said Richard Raphael. *"Our representatives are very excited about Capturx because they spend a lot of time in the field and the solution makes a huge impact on their day-to-day work-life balance."*

Better Customer Experience
By automating the application process with pen and paper, Healthfirst is able to provide enrollees with a familiar and easy form-filling process. At the same time, Healthfirst is also able to do immediate review and error-catching – which speeds up processing and prevents enrollees from having to set aside time for additional meetings. When forms are submitted, representatives get immediate receipt of confirmations and alerts about any incomplete or missing data. If the application is not complete, then the representative can immediately fix the issue in the form while they are still with the enrollee.

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